

Documenting Your Bequest Intention

To confidentially document your bequest intention, please complete the Bequest Intention Form. Completion of this form is not legally binding, but notification of intent. All information will be kept in the strictest confidence and used for internal planning only.

In order to support the mission of Guild, I / we have included a non-contingent bequest to Guild as part of my / our estate plan. If I / we make any change to this provision, I / we will notify Guild of such a change.

Name(s) _____

Address _____

City _____ State _____ Zip _____

Home Phone _____ Mobile Phone _____

Email Address _____

Please indicate your type(s) of planned gift below:

Bequest in my/our will (percent or dollar amount) _____

Trust (percent or dollar amount) _____

Retirement Plan Beneficiary

Life Insurance Beneficiary

Charitable Gift Annuity

Family Foundation or Donor Advised Fund Beneficiary

Name of current financial manager

Other (real estate, land, business, securities) _____

Current Estimated Value of Bequest _____

Please add any details you wish to share about your gift intention _____

Name and phone number of attorney or financial advisor (optional)
